



Nottingham Trent
University

Choose Your Own Alma Adventure

Figuring out e-collection workflows at NTU

Lee Houghton

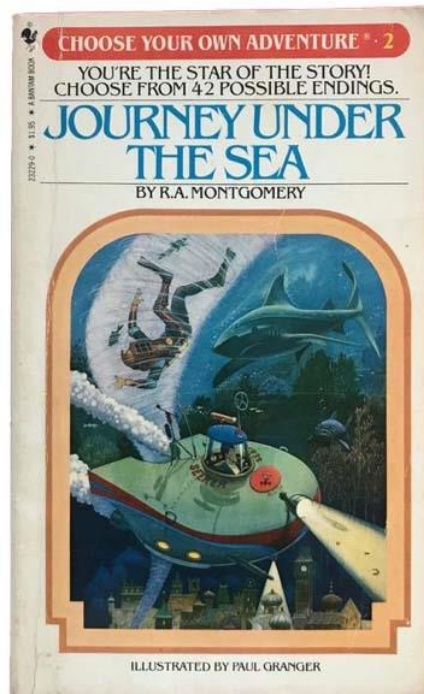
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Libraries and Learning Resources

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Choose Your Own Adventure



- Series of children's gamebooks popular in the 80's and 90's
- Reader chooses from multiple protagonists
- After a few pages of reading protagonist faces 2 or 3 options, leading to further pages and further options
- Eventually arrive at one of many endings
- The reader is pulled back and forth through the pages of the book
- Repeat readings often lead to a different ending

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Choose Your Own Alma Adventure

- Background
- Guiding principles
- Challenge 1: Collate standalone portfolios into e-collections
- Challenge 2: Link local collections to Community Zone
- Challenge 3: Updating collections
- Challenge 4: Activating new collections
- Challenge 5: Tracking e-collection information
- Future plans



Background



Background

- Launched Alma in January 2022
- Aleph – Alma migration project completed entirely remotely
- Metadata and Discovery Team responsible for e-records management
- 4 Metadata and Discovery Librarians, mix of full- and part-time posts

Guiding principles



Guiding principles


- Collate standalone portfolios into e-collections:
 - To match the Community Zone model
 - More bulk jobs and tools available for e-collections
 - Standalones eradicated by end of May 2023
- Link collections to the CZ:
 - Let CZ manage our portfolios – alleviate workloads
 - Automatic updates particularly beneficial
 - Trust the accuracy of the CZ and just manage exceptions

Challenge 1

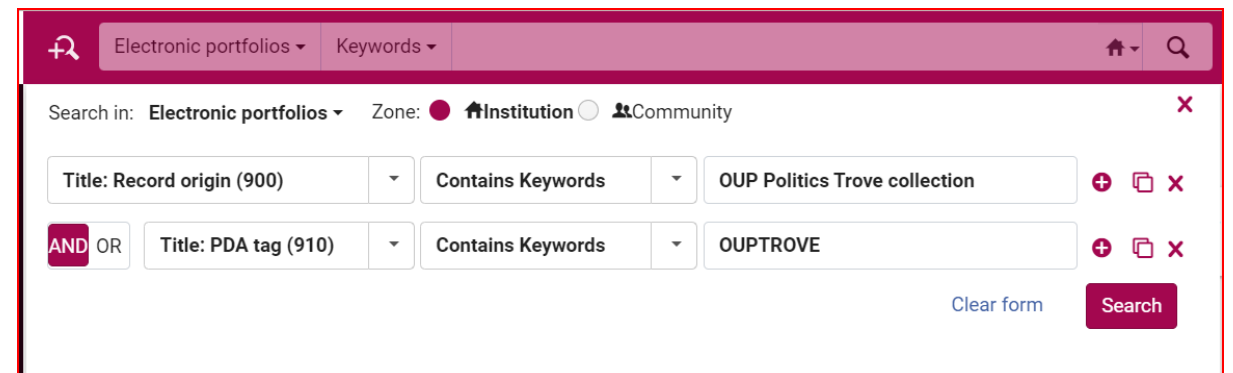
Collate standalone portfolios into e-collections



Collate standalone portfolios into e-collections

- Had to identify commonality between records from the same package
- Lucky that Aleph MARC records contained codes and set statements in local fields
- Built sets using advanced search  Used to create local collections

700	1_ a Jackson, Robert H. t Introduction to international relations. s Seventh edition.
776	08 i Print version : z 9780198862208
830	_0 a Politics trove.
856	40 u http://dx.doi.org/10.1093/hepl/9780198862208.001.0001 y electronic book 4 no copyright message
900	__ a This eBook is part of the OUP Politics Trove collection
910	__ a OUPTROVE z OUPTROVE



The screenshot shows an advanced search interface with the following elements:

- Search in: Electronic portfolios
- Keywords: Keywords
- Zone: Institution (selected), Community
- Search criteria:
 - Title: Record origin (900) Contains Keywords OUP Politics Trove collection
 - AND OR Title: PDA tag (910) Contains Keywords OUPTROVE
- Buttons: Clear form, Search

Challenge 2

Link local collections to Community Zone



Link local collections to Community Zone

- Is it possible? Check local records contain ISBNs/ISSNs

Electronic Service Editor

	<input type="checkbox"/>	Availability	Identifier	▲ Title	Coverage
3	<input type="checkbox"/>		9780198811404	Comparative European politics : distinctive democracies, common challenges / edited by Rory Costello, Neil Robinson.	-
4	<input type="checkbox"/>		9780198820604	Comparative politics / edited by Daniele Caramani.	-
5	<input type="checkbox"/>		9780198782742	Contemporary political philosophy : an introduction / Will Kymlicka.	-
6	<input type="checkbox"/>		9780198804109	Contemporary security studies / edited by Alan Collins.	-
7	<input type="checkbox"/>		9780198862192	Contemporary security studies / edited by Alan Collins.	-

Link local collections to Community Zone

- Which CZ collection? So many to choose from...
- We search CZ collection list spreadsheet to look for candidates – taking note of number of portfolios and update date

Electronic Collect	Electronic Collection Public Name	No. of Portfolio	Last Update Date	
0	611000000000002653	Cambridge Companions Complete Collection	830	29/04/2023
3	612560000000000004	Cambridge Companions to Philosophy, Religion and Culture	263	29/04/2023
4	612560000000000005	Cambridge Companions to Literature & Classics	442	27/04/2023
5	612560000000000006	Cambridge Companions to Music	91	03/04/2023

Link local collections to Community Zone

- Overlap and Collection Analysis tool is used to compare more than one candidate CZ collection with our local collection.
- Link to CZ collection with best coverage based on an ISBN/ISSN match

Analyzed Collection

Electronic coll...	Collection ID	Number of Uni...	Number of por...	Scope
1 Oxford University Press Politics Trove	6116589731...	58	58	Institution Zone

Compared With

Selected collections from Community Zone

Electronic coll...	Collection ID	Number of Uni...	Number of por...	Scope
1 Politics Trove	6154100000...	46	46	Community Zone
2 Bacon Oxford University Press Global Politics Trove \$OUP_GLOB... TROVE	6143300000...	63	63	Community Zone

Challenge 3

Updating collections



Updating collections

- Method used for collections that are not set to auto-update
- Aim to create subset of records to add or remove, rather than refresh the whole collection
- Prepare a file for import using MarcEdit.

Updating collections

- Retrieve all ISBNs from supplier MARC file and paste into Excel file

The screenshot shows a MARC file search interface. On the left, a list of MARC records is displayed, including fields like LDR, 001, 003, 005, 006, 007, 008, 020, 035, 040, 072, 100, 245, 250, 260, 300, 505, 520, 533, 538, 655, 700, 710, 776, and 856. A search window titled "Find All Results" is overlaid on the right. The search criteria is "=020 was found 112 times." The search results are displayed in a table with two columns: "Found Text" and "Action".

Found Text	Action
=020 \\\$a9781789661774 (print)	Jump to Record #: 1
=020 \\\$a9781789661781 (electronic bk.)	Jump to Record #: 1
=020 \\\$a9781843981664 (print)	Jump to Record #: 2
=020 \\\$a9780749482503 (electronic bk.)	Jump to Record #: 2
=020 \\\$a9781843983668 (print)	Jump to Record #: 3
=020 \\\$a9781843983682 (electronic bk.)	Jump to Record #: 3
=020 \\\$a9781843983606 (print)	Jump to Record #: 4
=020 \\\$a9781843983699 (electronic bk.)	Jump to Record #: 4
=020 \\\$a9781843982289 (print)	Jump to Record #: 5
=020 \\\$a9781843983620 (electronic bk.)	Jump to Record #: 5



Below the table, there are three actions: "Jump to Record", "Edit Find Query", and "Extract Found Records". A "Close" button is located at the bottom right of the search window.

Updating collections


- Overlap and Collection Analysis > Look up Titles report compares ISBNs from supplier file against Institution Zone holdings

CIPD Kogan e May update


Look Up Titles

 Created by LIB3GALLAJA
18/05/2023 11:28:21  Completed Successfully

Process ID: 5492735630007181
Total run time: 7 Seconds
Started on: 18/05/2023 11:29:44
Finished on: 18/05/2023 11:29:52

Analysis Report 

Input file: [CIPD ebooksE May 2023.xlsx](#)

49 (87.5%) Input file titles found in the Institution Zone electronic resources 

All titles from input files that have a match with electronic resources in the Institution Zone

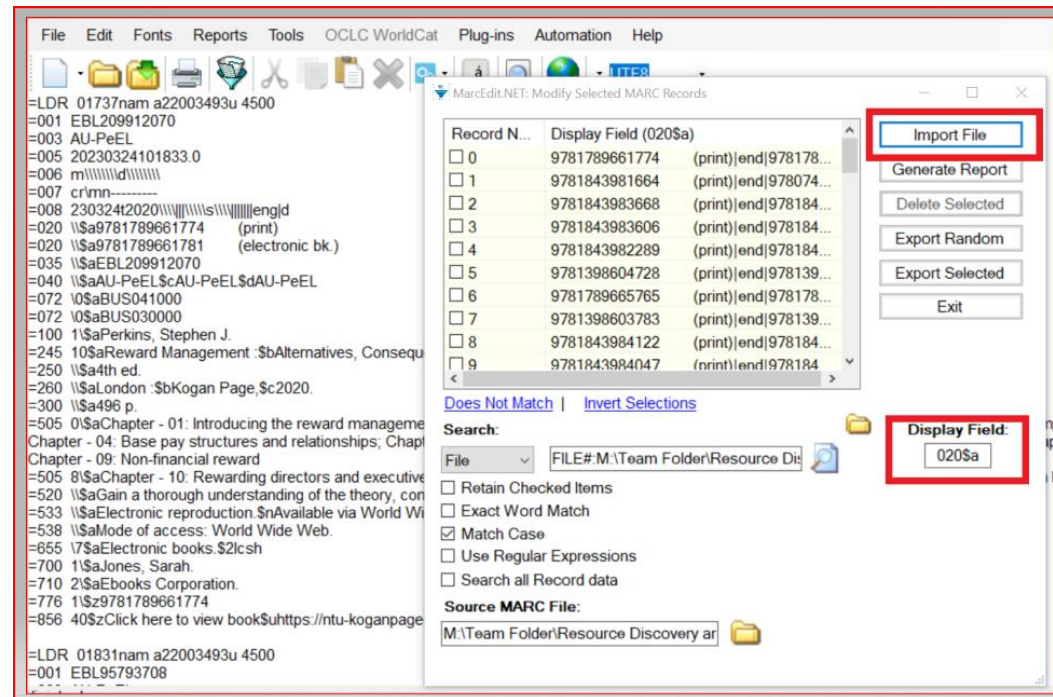
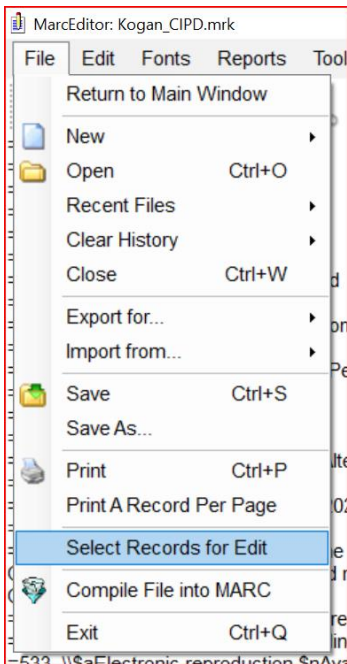
Updating collections

- All ISBNs on the 'No Matches or No Resources' tab are new titles
- Matches that do **not** list the collection we're updating are also new titles

1	Title	ISBN(Matching Identifier)	MMS ID	Collection	Interface
	{"Research methods in human resource management : investing a business issue."}	9780749483883	{"990013314690107181"}	{"CIPD Kogan Books"}	{}
2	{"Leading managing and developing people."}	9781843984375	{"990013314590107181"}	{"CIPD Kogan Books"}	{}
3	{"Resourcing and talent management the theory and practice of recruiting and developing a workforce /"}	9781398600508	{"9917631605307181"}	{"VLeBooks"}	{"Browns Books for Students"}
4	{"Human Resource Management at Work."}	9781843984368	{"990013314720107181"}	{"CIPD Kogan Books"}	{}
5					

Updating collections

- MarcEdit can take a text file of new ISBNs and extract a subset of records from the supplier file, ready to be picked up by an Alma import profile



Updating collections

- Portfolios can be linked to the CZ at the point they are imported, or after they have joined the collection

Profile Details | Normalization & Validation | Match Profile | Set Management Tags | Inventory Information

Inventory Operations

Electronic Mixed Physical None

Electronic Resource Mapping

Delete/deactivate portfolios

Use Community Zone portfolios

Portfolio type Standalone Part of an electronic collection

Activation | Service Description | Linking | Portfolios | Notes | History

1 - 20 of 58 ISBN

Link Local Portfolios to Community Move Set of Portfolios

Status : All CZ Linking : All COUNTER Platform : All

	Availability	Identifier	Title
1	<input type="checkbox"/>	9780198840626	British politics : an analytical approach / Peter J

Challenge 4

Activating new collections



Activating new collections

- Decision path branches into whether a new collection can utilise the CZ or has to remain local
- Overlap and Collection Analysis tool can still be used to compare title list of new collection against candidate CZ collections
- Activate CZ candidate collection > Ensure service not available to prevent discovery > Compare CZ to supplier title list with 'Look Up Titles' report
- Strong overlap + good quality bib records = decision to utilise CZ
- If service also set to auto-update, new collection will be fully CZ-managed

Activating new collections

- If no appropriate collection in the CZ, new collection will be fully locally managed
- Local collections created from Alma resources menu and populated by import profile
- Hybrid collections are most common – most portfolios linked to CZ, remainder stay local but can be converted if CZ package is updated.



Challenge 5

Tracking e-collection information



Tracking e-collection information

- Collection record 'Internal description' field records key information about collections
- Chosen because it shows up on analytics reports

Electronic Collection Description

General Additional Notes History CDI

Public name **O'Reilly Online Learning: Academic/Public Library Edition**

Public name (override) **O'Reilly online learning collection**

Description Expert-created and curated information covering all the areas that will shape our future—including artificial intelligence, operations, data, UX design, finance, leadership, and more. For more info: <https://www.oreilly.com>

Description (override) -

Internal description **Purchase model: Annual subscription || Update frequency: Quarterly || Last updated: Auto-updated**

Library

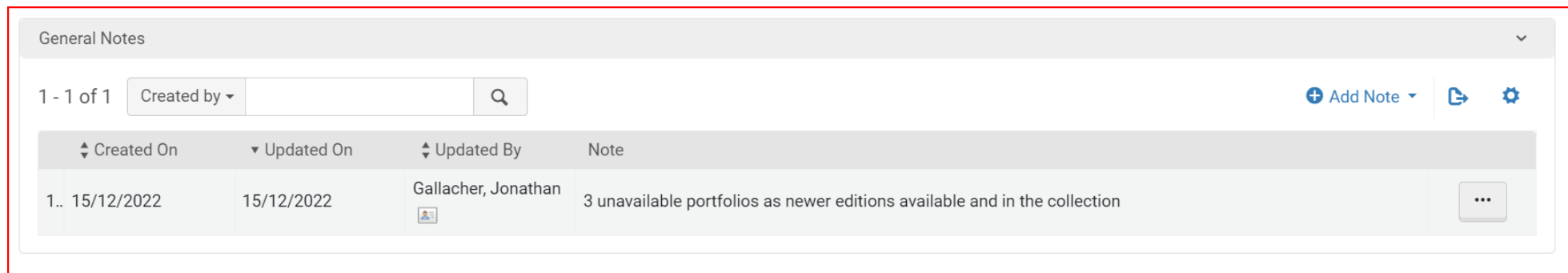
K	L
Electronic Collection Public Name (override)	Electronic Collection Internal Description
O'Reilly online learning collection	Purchase model: Annual subscription Update frequency: Quarterly Last updated: Auto-updated
SAGE Journals	

Tracking e-collection information



- Update collection record with any general notes (Electronic collection > Edit Collection > Notes tab > Add note > type in note > Add)

Useful information to add as notes:

- Why the collection wasn't linked to the CZ (e.g. no suitable collection, collection not up to date)



The screenshot shows a 'General Notes' interface. At the top, it says 'General Notes' with a dropdown arrow. Below that, there is a pagination indicator '1 - 1 of 1', a 'Created by' dropdown menu, and a search icon. On the right side, there are three icons: a blue plus sign with 'Add Note', a share icon, and a settings gear icon. The main content is a table with the following columns: 'Created On', 'Updated On', 'Updated By', and 'Note'. There is one row of data:

Created On	Updated On	Updated By	Note
1.. 15/12/2022	15/12/2022	Gallacher, Jonathan 	3 unavailable portfolios as newer editions available and in the collection 

Future plans



Future plans

Integrations

- Used Ebook Central since Day 1.
- Recently activated Springer eBooks.
- Job reports still need to be checked and acted upon.

Developing robust QA processes

- Necessary because quality of CZ bib records is still variable.
- New Bibliographic Rank will help us define what a “good enough” MARC record looks like.

CZ updates task list

- Records activity of collections that are set to auto-update.
- What does each type of update mean? Which updates require staff intervention?





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